

Memorandum

To: Arlington Redevelopment Board
From: Charlie Foskett
Date: January 28, 2004
Re: SAC Findings on Responses by Bidders to Requests for Proposals

Introduction

Thank you for the opportunity to meet with you this evening. Also, thank you for the thorough preparation of the RFP material, and for including the SAC report and recommendations. As you may know, the SAC has held three meetings over the last several weeks with respect to the response from the bidders. One meeting was devoted to developing a protocol for preparing our findings. A second was primarily a detailed discussion of the various bids, and a third was additional discussion and a vote on our findings. Interleaved with these meetings, many of the Committee members attended the two bidder presentation meetings and the ARB public forum of last Monday evening.

Based on the interest of the Committee to advise, but not encumber, the ARB as well as on the advice of Town Counsel, the SAC determined to 1) Use Planning Director Kevin O'Brien's summary format (a version is attached) and index system for preparing its data, 2) Not directly rank or grade the bidders on a relative basis since that is ultimately the responsibility of the ARB, and 3) To provide in each category of our recommendations the sense of the SAC as to whether each proposal "Met the Requirements and Recommendations of the SAC", "Did Not Meet" said requirements or whether it was not possible to judge that ("Do Not Know").

The principal source of information was what the bidders presented in their proposals. No doubt some of the bidder presentations and later materials may have had some influence on our findings, but it was the sense of the Committee that these late changes were more "negotiations" by the parties and would best be collectively reviewed by the ARB. The Committee also relied on VHB's summary matrix as a resource, as well as direct advice by VHB. The Committee prepared its findings based on the detailed recommendations of the SAC report to the 2003 Annual Town Meeting.

Attachments

There are two documents attached. One is an excerpt from our report to the 2003 Annual Town Meeting, with our Requirements and Recommendations keyed to Kevin O'Brien's summary table, prepared by Brian Rehrig. The second is a color coded table with the Committee's vote on each category, prepared and formatted by Cindy Friedman and Elisabeth Carr-Jones. The actual vote is shown, and the color categories are Strong Positive (6 or higher) as Green, Strong Negative (6 or higher) as Tan, Mixed Result (Blue) and Don't Know as White. We hope this is helpful, and are prepared to answer any questions you may have. Because the financial information was incomplete, and the work of RKG not yet available, the Committee will provide those findings when the information is available.

Symmes Sdvisory Committee Proposal Review and Votes 27 Jan '04

		Fish			Baran/Keen			Diversified			Archstone		
		Meets Req	Does Not	Don't Know	Meets Req	Does Not	Don't Know	Meets Req	Does Not	Don't Know	Meets Req	Does Not	Don't Know
1. Balanced mixed use													
A1	Site planned for in its entirety (R)	8	0	0	8	0	0	8	0	0	8	0	0
A4	Mixed use with medical, commercial, open space and residential (R)	8	0	0	7	1	0	7	0	1	3	5	0
A5	No more than 410,000 square feet of development (R)	8	0	0	0	8	0	8	0	0	8	0	0
A6	Preference for lower intensity of development	2	4	2	0	8	0	1	7	0	6	1	1
2. Revenue neutral and self supporting													
A40	RKG Financial model used for evaluation (not a selection criteria)												
A41	Has cash balance in excess of Buffer Reserve – \$1.5M during construction, \$1M after construction, \$.5M after ten years (R)												
A43	No building requires tax levy based subsidy from Town												
A44	Development requires no new Town borrowing without a referendum vote (R)												
3. Maintain amount of open space													
A3	Open space permanently protected (R)	1	0	7	0	1	7	0	0	8	2	0	6
A21	At least 50% of land is open space (R)	5	0	3	0	4	4	4	0	4	7	0	1
A22	Open spaces coordinated and interconnected (R)	4	2	2	6	1	1	3	3	2	6	0	2
A23	Developer responsible for maintenance for open spaces	7	0	1	2	0	6	2	0	6	1	0	7
A24	Include large passive use open space that is accessible to public	8	0	0	6	2	0	3	5	0	8	0	0
A25	Include one acre vista park (R)	5	0	3	6	2	0	1	5	2	8	0	0
4. Promote expanded health care services													
A10	Maintains current medical uses and maintains service during construction	7	0	1	5	2	1	6	0	2	0	6	2
A11	Expansion of medical or wellness uses	8	0	0	7	1	0	2	5	1	2	6	0
6. Affordable Housing													
A7	30% of housing shall be affordable	0	8	0	7	1	0	0	8	0	0	8	0
A8	Utilizes resources of non-profits and public agencies to increase affordable component	2	2	4	5	0	3	1	3	4	1	0	7
A42	Includes more than 15% affordable housing and public use facilities are self supporting (R)	5	3	0	8	0	0	0	8	0	4	4	0
7. Public Amenities													
A9	Provides public amenities on or off site	4	3	1	5	1	2	0	7	1	3	4	1
A12	Creation of Community Center (if no wellness facility)	0	0	8	0	0	8	0	0	8	0	0	8
A35	Pedestrian access to and through the site (R)	8	0	0	7	1	0	2	6	0	7	1	0
A36	Includes off site pedestrian access improvements	6	0	2	0	1	7	0	2	6	0	4	4
A37	Includes public transportation to the site (R)	8	0	0	8	0	0	5	0	3	1	5	2
8. Traffic and access issues													
A28	Site is accessed primarily from Summer Street (R)	8	0	0	6	1	1	6	0	2	6	1	1
A29	Truck access limited to Summer Street entrance (R)	4	0	4	3	1	4	4	0	4	3	1	4
A30	Woodside Lane entrance limited to 10% of total traffic (R)	1	0	7	1	0	7	1	1	6	0	3	5
A31	Redesign of Hospital road to increase efficiency	7	0	1	6	2	0	1	7	0	6	0	2
A32	Traffic mitigation includes nearby intersections (R)	7	1	0	1	1	6	0	7	1	5	0	3
9. Neighborhood Protection Plan													
A38	Includes neighborhood protection plan to mitigate construction impacts (R)	0	2	6	0	2	6	0	2	6	0	2	6
10. Items that will be considered in Environmental Design Review process													
A13	Creative re-use of existing buildings	0	7	1	6	2	0	7	1	0	0	8	0
A19	Massing and design of buildings is pleasing when viewed from afar	4	2	2	3	3	2	0	5	3	0	8	0
A20	"Top" of site developed compatibly with low density surrounding neighborhood	4	3	1	7	0	1	1	5	2	0	8	0
A26	Conduct traffic study and implement mitigation measures (R)	5	0	3	0	1	7	0	3	5	1	2	5
A27	Peak hour traffic should not exceed the peak traffic generated by the previous hospital operation (R)	6	0	2	4	1	3	3	0	5	4	1	3
A34	Shared parking on site is encouraged	3	1	4	0	0	8	0	1	7	2	1	5
A39	Conforms to Leadership in Energy and Environmental Design (LEED) standards	6	0	2	7	0	1	5	1	2	0	7	1
11. Items that are controlled by zoning													
A14	Minimum 25 to 30 foot setbacks to abutting properties (R)	8	0	0	6	1	1	2	4	2	2	5	1
A15	Design that is sensitive to shadow effects on abutting properties (R)	6	0	2	4	3	1	0	8	0	0	8	0
A16	Expansion of existing buildings subject to height and setback regulations (R)	0	0	8	6	1	1	8	0	0	0	0	8
A17	Wooded buffer areas adjacent to abutting properties (R)	6	1	1	4	2	2	1	6	1	0	8	0
A18	Limit building height to 70 feet	2	6	0	6	1	1	7	0	1	7	0	1
A33	All parking is provided on site (R)	8	0	0	6	1	1	6	0	2	5	2	1

Color code	Strong Meets Req	Strong Does Not Meet Req	Mixed Position	Do Not Know

Town of Arlington
Symmes Advisory Committee
Recommendations to Special Town Meeting
May 5, 2003

**EXCERPTED FROM RECOMMENDATIONS SECTION,
RENUMBERED TO COINCIDE WITH SPREADSHEET NUMBERING**

Performance Standards, Guidelines and Controls

The following standards, guidelines and controls are recommended by the SAC to ensure that redevelopment of the Symmes property is consistent with the goals of the community. The elements have been organized into two categories, “Requirements” and “Preferences.”

Requirements are defined as those elements that are of ultimate importance to the SAC and must be adhered to within any development proposal. Preferences are defined as those elements that the SAC has identified as being significant goals for redevelopment of the site and would be favored within development proposals. Additional elements may be desirable and of benefit to the project and the community. Respondents should carefully review the reports of the SAC Working Groups to gain additional insight into community desires.

The following sections outline the performance standards, guidelines and controls for the site according to five areas: Parcel Distribution; Land Use and Program; Building Heights and Setbacks; Open Space; Traffic, Access and Parking; Construction; and, Financial.

Parcel Disposition

Previous planning work identified four “development zones” for the site, as shown in Appendix C. The development zones include “The Top,” “The Overlook,” “The Ridge,” and “Summer Street.”

- A-1. REQUIREMENT: The site shall be planned in its entirety. Disposition may be as a single parcel or as separate parcels as the Arlington Redevelopment Board (ARB) finds most effective, provided that the ARB publicizes in advance Neighborhood Protection Plans and tenant retention programs that are integrated with the choice of single or multiple developers.
- A-2. REQUIREMENT: Development parcels may be ground leased or sold outright subject to permanent use restrictions.
- A-3. REQUIREMENT: Public open space areas must be permanently protected for their prescribed purpose as outlined in later sections of this document.

Land Use and Program

Prototypical site use recommendations are set forth as three Conceptual Alternatives presented and endorsed by the SAC to be used as the basis for establishing zoning and land use restrictions, and other urban renewal plan constraints on the site. For purposes of this report these plans are identified as Conceptual Alternative 1 – Mixed Income Housing, Conceptual Alternative 2 – Commercial/Medical Development, and Conceptual Alternative 3 – Infrastructure Cost Savings. See Appendix D.

- A-4. REQUIREMENT: The project must be a mixed-use development. Preference will be given to proposals that most successfully integrate medical, commercial and public uses with residential development.
- A-5. REQUIREMENT: Preliminary master planning indicates that a development range of 370,000 to 410,000 SF can achieve the Development Goals and Objectives set forth above. The 410,000 SF shall be considered the upper acceptable limit.
- A-6. PREFERENCE: Preference shall be given to proposals that result in a lower intensity of development than that set forth in the three Conceptual Alternatives.
- A-7. PREFERENCE: A 30% affordable housing component is a valid and realizable goal of the project, and proposals that provide that amount shall be preferred. The use of available subsidy programs is encouraged to materially increase the amount of affordable housing beyond the 15 percent currently required in the Town's Zoning Bylaw. The Town will work with proponents to direct those dedicated sources of affordable housing funding that are under Town control toward the project at appropriate levels to aid in the achievability of this goal. [See Appendix E.] The affordable housing should predominately be targeted to families earning less than 80% of median income, but a portion of the housing should be targeted to families earning between 80-120% of median income with the specific objective of meeting the needs of existing Arlington residents and Town of Arlington employees. The housing should consist of a mix of rental and homeownership opportunities, be protected long-term, and be dispersed throughout the development.
- A-8. PREFERENCE: Municipal agencies and not-for-profit institutions of the Town of Arlington can provide resources and offer assistance in achieving stated goals and objectives related to affordable housing and other community needs, and are potential partners in development. See Appendix F. Proponents are encouraged to explore these resources.
- A-9. PREFERENCE: Preference shall be given to proposals that provide additional public amenities on- or off-site, provided that they fulfill the desired objectives described herein.
- A-10. REQUIREMENT: Provision of facilities to house the medical services existing on the site at the time redevelopment is being considered is required. Proponents must negotiate in good faith with then-existing medical providers to retain their presence either on the site or within the community. A transition program must be developed to maintain the existing level of medical services available to the community at all times during the redevelopment process.

- A-11. PREFERENCE: Expansion of medical or healthcare uses on-site is highly desired. It is recommended that a Medical Wellness Center use prototype, consisting of medical office, wellness and fitness services, be considered. Previous planning proposed a Wellness Center of approximately 65,000 square feet. The health care/medical space shall be prototyped as commercial market rate space. The fitness activity space shall be prototyped at commercial market rates, although its funding may be derived from either for-profit or not-for-profit organizations under future plans developed by the Arlington Redevelopment Board. A preferred component of the fitness activity portion of this complex is an affordable community aquatics facility. If funding for the fitness activity component is not timely available, then the prototype may be considered as expanded health care medical space to the extent that there is identifiable economic demand.
- A-12. PREFERENCE: In the event that for any reason it proves infeasible to develop a significant medical component on the site, then subject to financial, parking and traffic considerations a preferred alternative would be an integrated "Community Center" to be prototyped at commercial market rates. (See Report of Public Use Working Group, Appendix G).
- A-13. PREFERENCE: While the Conceptual Alternatives provide prototypical uses to assist in the redevelopment of the site, solicitation of development proposals for the site should allow for the creative and economic reuse of the existing hospital buildings provided they fall within the development programs, environmental, traffic, financial and other constraints developed in the SAC alternative use profiles.

Building Heights and Setbacks

- A-14. REQUIREMENT: Minimum 25-to 30-foot setbacks from property lines are required for all buildings and parking areas on the site in accordance with Section 6 of the Zoning Bylaw [see Appendix J for all Zoning Bylaw references].
- A-15. REQUIREMENT: The provisions of Section 6.13 of the Zoning Bylaw should be used to ensure a sensitive relationship between abutters and buildings constructed on this site. Creative and innovative building design (i.e. stepped-back building massing or terracing) is encouraged to minimize negative impacts on adjacent properties or areas with distinctive views of the property.
- A-16. REQUIREMENT: Existing buildings if retained in their current form must conform to Section 9 of the Zoning Bylaw; expansion of existing buildings are subject to the height and setback requirements as noted above.
- A-17. REQUIREMENT: Wooded buffer zones should be incorporated as design elements to separate the abutting neighborhoods from parking lots and buildings, in accordance with Sections 6.16(a) and (b) and Section 8.12(b)(1) and (2) of the Zoning Bylaw.
- A-18. PREFERENCE: Preference will be given to proposals that limit building heights to a maximum of five stories or 70 feet, and it is recommended that proposals be carefully modeled and demonstrate minimal off-site impacts related to building heights. Following

receipt of responses to the RFP, the ARB should propose specific height regulations to Town Meeting to amend the Zoning Bylaw to deal with the specific rezoning of this site.

A-19. PREFERENCE: Massing and heights of buildings will be evaluated with respect to their appearance from a distance and under the provisions of Section 11.06 of the Zoning Bylaw.

A-20. REQUIREMENT: Development within “The Top” zone shall be of a scale and intensity of use that is compatible with adjacent properties and the surrounding neighborhood. Prospective developers should be aware that the neighborhood surrounding “The Top” is a relatively low intensity, small scale development and any proposal will be evaluated carefully on its relationship to the neighborhood.

Open Space

A-21. REQUIREMENT: Not less than 50 percent of the site is to be set aside as open space (defined as publicly accessible open land, steep slopes, scenic overlooks, environmentally sensitive areas, forest, and walking paths).

A-22. REQUIREMENT: The open spaces of the site are to be established as an interconnected system, maximizing reuse of natural and existing woods and vegetation in a manner that is restored or improved as appropriate to maintain sanctuary for birds and other wildlife. Walking trails shall connect all significant open space areas.

A-23. PREFERENCE: Preference will be given to proposals where the proponents will be responsible for ongoing maintenance of public open space areas.

A-24. REQUIREMENT: The open space network must include an area of substantial size for passive recreational use and be designed to provide maximum accessibility to the Arlington community as a whole.

A-25. REQUIREMENT: A Scenic Vista Park of not less than one acre is required, located such that it takes maximum advantage of the site’s dramatic views of the Boston Basin for the benefit of the public. Design guidelines for the Scenic Vista Park are provided in Appendix H.

Traffic, Access and Parking

A-26. REQUIREMENT: A comprehensive traffic impact study will be required for any proposed development, and proponents will be required to complete identified mitigation measures.

A-27. REQUIREMENT: Development shall be limited to the total number of peak-hour vehicle trips that were generated when the hospital was in full operation (estimated to be 375 vehicles during the evening peak hour as noted in Appendix I).

A-28. REQUIREMENT: Primary access to the site shall be from Summer Street.

A-29. REQUIREMENT: Truck access shall be limited to the Summer Street entrance.

- A-30. REQUIREMENT: Woodside Lane shall remain a low-volume local roadway. No proposal should suggest that more than 10 percent of non-residential peak-hour site traffic would utilize Woodside Lane. Proposals suggesting programs to minimize use of Woodside Lane, including the installation of a traffic monitoring program, are encouraged.
- A-31. PREFERENCE: Redesign or relocation of the intersection of Hospital Road and Summer Street is preferred in order to enhance the operational efficiency of the intersection.
- A-32. REQUIREMENT: Traffic mitigation measures should take into consideration the intersections of Summer Street with Oak Hill Drive, Grove Street, Hospital Road and Brattle Street/Hemlock Street.
- A-33. REQUIREMENT: All parking shall be provided on-site.
- A-34. PREFERENCE: Shared parking among on-site uses is encouraged as long as all parking can be accommodated on-site during peak-hours without spillover to facilities off-site.
- A-35. REQUIREMENT: An on-site pedestrian network is required, with connections to public points of access. Sidewalks along the Summer Street frontage are required.
- A-36. PREFERENCE: Off-site improvements that provide pedestrian connections to schools and the Minuteman Bikeway are encouraged.
- A-37. REQUIREMENT: Public transportation to the site shall be accommodated and promoted. The proponents shall work with the MBTA to designate appropriate locations for bus stops to service the site.

Construction

- A-38. REQUIREMENT: A Neighborhood Protection Plan must be provided and publicly reviewed to ensure minimal impacts to adjacent neighborhoods occur during construction, including blasting, building demolition, hours of construction, designated truck routes, etc.
- A-39. PREFERENCE: Preference will be given to proposals that indicate a commitment to Leadership in Energy and Environmental Design (LEED) certification as defined by the United States Green Building Council.

Financial

- A-40. Recommendation: Decision Modeling The financial model developed by VHB be the principal tool for all evaluations of criteria related to or needed for financial decisions. [See example, Appendix K.]
- A-41. Requirement: Risk Reduction In any course of action of the ARB, except in cases of extreme fiscal emergency the cumulative cash balance versus time may not be lower than the Buffer Reserve “BR” or three year’s debt service whichever is higher until the Urban Renewal Plan is closed and debt is paid. During the construction and redevelopment phase

of the Urban Renewal Plan, the BR value shall be \$1.5 million. After the construction and redevelopment phase but during the first ten years of the project the value BR shall be \$1 million. After the first ten years the value of BR shall be \$500,000.

- A-42. Requirement: Absorption Limitation The project shall include as the minimum number of affordable housing units the higher of either 20 units or 15% of the total number of units in the manner described by the Town by-law. The number of affordable housing units may be increased to a maximum of 30% of the total units on the site so long as no additional local tax levy is required. Any public use facilities including basic parkland required as part of site improvement shall be developed and operated on a self-supporting basis, and any such project development shall pay land transactions at market rate.
- A-43. Requirement: Operating Limitation The ARB shall develop no building or structure within the project if the operation and maintenance of such requires a tax-levy based subsidy from the Town either within or outside of the limits of Proposition 2½.
- A-44. Requirement: Borrowing The Town has obtained all the borrowing authority needed to develop the site to the limit of the March 2001 referendum. The debt excluded borrowing limit is \$14 million. Any additional excluded borrowing requires a new vote of the citizens. Any borrowing required and not excluded through an Additional referendum shall be funded through the non-exempt Town budget.
- A-45. Recommendation: Project Management The Symmes Advisory Committee, after due consideration, recommends that the ARB, under the authority of Section 121B is the appropriate body to insure the long-term development, management and disposition of the Symmes Campus.
- A-46. Requirement: Aggregation of Costs and Income Upon the awarding of any development contract, the Arlington Redevelopment Board shall request that Town Meeting take all appropriate and reasonable steps, including the filing of Home Rule legislation, to enable the Town to aggregate cost and expenses and income of the Symmes Project in the following manner with funds to be distributed by the Town Manager upon the recommendation of the Treasurer and approval of the Board of Selectmen:
- a) All land sale or ground lease revenues are first applied to the payment of project costs including operation and maintenance costs, planning and development costs and current debt service.
 - b) All rental or lease income from facilities, structures, equipment, material or land owned by the Town is first applied to the payment of project costs including operation and maintenance costs, planning and development costs and current debt service.
 - c) All income and fees for any services provided by the Town at, on or near the site as a result of the Town owning the site shall first be applied to the payment of project costs including operation and maintenance costs, planning and development costs and current debt service.
 - d) All other site related income including taxes and payments in-lieu-of-taxes of any kind shall first be applied to the payment of project costs including operation and maintenance costs, planning and development costs and current debt service.

- e) From time-to-time, upon the accumulation of sufficient surpluses from the various incomes of the project, the Town may, upon the determination of the ARB, make payments to reduce the principal of outstanding debt.
- f) All income to the project, whether fees, taxes, borrowings, or other income of any kind shall be deposited in a project revolving fund. After application of the available funds to the purposes described in this memo above and upon the completion of the development of the Symmes Campus, the remainder shall be applied to a “Buffer Reserve” as otherwise described herein.
- g) Any funds in excess of the Buffer Reserve shall first be applied to reduce the tax rate of Arlington taxpayers so as to offset any remaining cumulative tax levy applied as a result of the Symmes project and not previously offset, and then shall be returned to the general fund each year.